

Annual Report to Trustees

From 1st January 2023- 31st December 2023

Charity Details

(charity's name, registration number, address and trustee names)

Name: Chuckery Education Support Trust

Registration Number: 1200803

Address: C/O Chuckery Primary School

Lincoln Road

Walsall

WS1 2DZ

Trustees:

Roland Roberts Ex Officio Trustee – Chair of Cadmus Governing body	Gaye Martin Co-opted Trustee – Community Trustee
Nicola Rudge Ex Officio Trustee – Chair of Governors Chuckery Primary School	James Pearce Ex Officio Trustee – Executive Headteacher – Chuckery Primary School

Charity Structure

(its structure and details of how it is managed, including how it recruits trustees)

There will be up to 5 Trustees who will oversee the trust. The Trust must operate with a minimum of 3 Trustees.

The body of Trustees shall be:

- The Executive Headteacher of Chuckery Primary School (ex Officio Trustee)
- The Chair (or Vice-Chair) of Governors of Chuckery Primary School (ex Officio Trustee)
- The Chair of The Cadmus Family of Schools (ex Officio Trustee)
- A Walsall councillor – (Co-opted Trustee)
- A Community Trustee – (Co-opted Trustee)

The co-opted Trustees shall be appointed by the Trustees. The Community Trustee may be a parent of a child at the school or a person who lives or works in the area local to the school or who the Trustees consider has appropriate financial, legal, investment or other expertise which is relevant to the work of the Charity. Co-opted trustees shall serve for a term of up to four years which may be renewed for one or more further terms.

Where the title of an ex officio Trustee is changed or no longer exists or

a body or committee referred is defunct whether by operation of law or otherwise the Trustees may make such amendments as are required to enable the body of Trustees to continue to be administered by up to five individuals

One of the Trustees should be appointed to act as Chair. The Executive Headteacher of Chuckery Primary School will not be eligible for the role of Chair. The role of Secretary and Treasurer to the Trust will be delegated to the Finance and Facilities Manager at Chuckery Primary School within the powers of delegation set out in the Chuckery Education Support Trust Deeds

Trustees will meet at least 3 times per year (termly) to:

- Review powers of delegation
- Consider funding requests and allocate resources
- Review spending
- Evaluate impact of spending
- Monitor investments and manage financial reserves
- Review Trustee membership
- Receive an annual external audit of Trust finances
- Ensure necessary documentation is provided to external agencies

The quorum of all meetings will be 3 and this excludes the Finance and Facilities Manager of Chuckery Primary School who holds a non-voting role.

Decisions made by Trustees should be determined by a majority vote. However, one of the trustees must be a co-opted trustee and must have voted in favour of the resolutions passed. A resolution in writing signed by all the Trustees, whether contained in one or more documents, shall be as valid and effectual as if it had been passed at a meeting of the Trustees.

Any two Trustees may sign a document on behalf of the Trustees to give effect to a decision made by the Trustees.

Trustees may participate in or hold a meeting of the Trustees by means of conference telephone or similar communications equipment so that all persons participating in the meeting can hear each other. Participation by such means shall be deemed to constitute presence in person.

Trustees will delegate the role of Secretary of the Trust to The Finance and Facilities Manager of Chuckery Primary School within their powers of delegation as set out in the Chuckery Education Support Trust Deeds.

The Secretary will ensure minutes and records of all decisions made by Trustees are made, signed and kept. Records of meetings and decisions made by the Trust will be stored at Chuckery Primary School

Charity Activities

(its activities and objectives in the year)

During the period 1st January 2023 until 31st December 2023 the trust made payments totalling £60,000 to Chuckery Primary School

The purpose of these payments was to enhance the social, emotional and academic learning experiences of the children attending the school by providing opportunities for them to spend time on and off the school site engaged in practical activities and experiences that consolidate and support their learning in the classroom.]

Payments were made to:

- Provide a minibus and cover other transport costs to enable off site visits
- Subsidies Residential visits
- Match school funding to employ a Curriculum Enhancement and Outdoor Learning Teacher
- Provide appropriate wet weather clothing and footwear
- Purchase resources for use in forest school

Achievements and Performance

(its achievements and performance, including reporting on its public benefit)
During the 2023-2024 Financial Year 460 children at Chuckery Primary School benefited from donations from the trust.

Every child attending the school as was able to access a range of curriculum enhancement activities beyond the classroom that supported their development socially, emotionally and academically. Each of these has been led by a qualified teacher with an expertise in learning beyond the classroom. No charge was made for any of the experiences provided.

Activities included:

- Forest School Sessions (All year groups)
- Wolseley Bridge – Exploring Rivers (Y4)
- Black Country Museum – Life in Victorian times (Y2)
- Client Hills – Orienteering and Teamwork (Y6)
- Bradford Estate – Life on a Farm (Identified disadvantaged pupils)
- Warrens hall Riding Stables – horse riding and Care (Identified disadvantaged pupils)
- Shrewsbury Prison – Crime and Punishment (Y5)
- Hednesford on the Train – Contrasting location (Y1)
- Forge Mill Farm – Farms (Reception)

Case Study

Year 2 Visits to Cannock Chase

Purpose

Year 2's mini adventure is '*How are maps used in stories?*', which is linked to their English topic/text '*The Gruffalo*'. During the mini adventure the children study the story as well as learning about maps, symbols, and the compass points.

The Year 2 visits were to 'The Gruffalo Trail' at Birches valley on Cannock Chase.

This location was chosen because of the obvious links to the text but also because it offered an unfamiliar location to the children. The area of the trail is in wooded plantations of pine trees with grass areas. The paths are levelled and wide, but they do twist and turn so the pupils would not be able to see very far ahead. These elements result in Birches Valley being an excellent location for learning to read a map and navigate a route.

I wanted somewhere the pupils were unfamiliar with and where they couldn't see very far. For example, the same exercise at Walsall Arboretum would not be as stimulating for the pupils because they can see clearly for over 200m in all directions of the park. Additionally, I have seen over the last year that going on the minibus automatically elevates the level of interest for pupils, a factor which help stimulate pupil learning. We are in small groups focussed on the subject in a way which is impossible in the classroom with 30 pupils.

Generally, our pupils are severely 'nature starved', visiting a location such as Birches Valley provides a whole range of exciting new experiences and learning opportunities. Throughout our map reading walks we regularly stopped to identify different plants, explore the purpose of pinecones, compare leaves and pinecones and so on. Enjoyment of these wild places also fuels discussions on the environment and how we need to care for it. When using their land the Forestry Commission want children to understand how they manage the woods and for what purposes.

'You (Mr Bamber) showed us pinecones which had been eaten by squirrels, we saw the places they had been eating!' Y

Impact

Pupils loved the drive to Birches Valley, especially at Hednesford when the road carried on through thick woods on either side. There were lots of excited comments on how close the trees were, how cool/scary/dark/exciting it was, along with more excitement when I told the pupils we were going into the woods for our map reading! At the start of the Gruffalo Trail, each pupil was given a map and we spent time discussing why we had the maps, what the symbols meant and why they were important. Pupils were then able to orient their maps and locate our position using the symbols and comparing that to what they could see around them (paths and buildings etc). This would not have been possible or had the same impact if it were carried out at a location familiar to the pupils because their prior knowledge of the location would have helped them.

'We learned to use a key, and we used it to find out what the different symbols mean' S

'It was more fun, and I learned more than working in school' A

The visits experienced all weathers, from cold windy rain to bright sunny days, pupils all wore school waterproofs, so they were warm and dry whatever the weather!

'We could hear the rain splashing in the puddles and the wind blowing in the trees, it was amazing!' R

'It was nice and peaceful listening to the rain' T

For almost all pupils the rain is something to be completely avoided, so going out in the rain for part of their learning was a complete revelation. This was only possible through the school's purchase of wellies and full sets of waterproofs.

'Mr Bamber made us stop and listen with our eyes closed. We were standing in the dark woods – it was fun, and we could hear so much!' A

"We will want to see if young children – particularly the disadvantaged – are thinking and talking about a wide range of experiences that prepare them for what comes next." (Gill Jones, Ofsted Early Education Deputy Director, speaking in *Nursery World Magazine*, May 2019)

Spending an extended amount of time outdoors helps develop a greater vocabulary as pupils communicate not only with each other but also with other adults. Each trip also introduced subject specific vocabulary to pupils. Which is then used whilst on

the trip and then in the classroom after. For example, 'symbol' – on a map, deciduous, (trees), pine tree, pine needles and so on.

'We could hear the trees moving and whispering in the breeze' T

'It was a brilliant day; I want to do it again even if it's raining' A

Visits such as these to Cannock Chase are successful due to careful choice of location, research and planning (I went to Birches Valley three times over a period of weeks beforehand mapping and walking the route). I knew the main subject knowledge from the mini adventure and then checked and developed my own knowledge of the location, such as tree types, to ensure each visit was as successful as possible.

The Year 2 staff all agreed that the trips had met and exceeded their intentions, *'Children got to apply what they had done in the classroom in a real-life situation.'*

'... they were using maps which were adapted to their level which they don't normally get to do.'

'The trip was focused on the maps. But they children all learned so much from being out with you.'

Before the walk pupils were briefed on how to behave when walking along the trails, what to do if a dog comes along, and what to do if members of the public say hello to them. Almost every group asked why people were walking their dogs on Cannock Chase, clearly not something many pupils can encounter – a walk for pleasure! I took a copy of the Gruffalo on the walks, and we read parts of the book at the relevant parts of the trail, the children loved this, and it provided a real connection between the woods, the story and the map reading.

'It was amazing listening to the story, standing in the trees, totally immersed in the environment. The pupils loved it and it was certainly nothing like anything they had experienced before'

Conclusion

The visits to Cannock Chase Forest were a resounding success. The children showed significant improvement in their map-reading skills and gained confidence in navigating using a map. The hands-on experience helped reinforce classroom learning, making abstract concepts more tangible and understandable.

The Year 2 visit to Cannock Chase Forest provided a valuable educational experience, blending the joy of storytelling with the practical skills of map reading. For many children, it was their first significant interaction with the countryside, leaving a lasting impression and a desire to learn more about the natural world. The success of this visit underscores the importance of experiential learning and the benefits of integrating outdoor activities into the curriculum.

Financial Review

(a financial review including any debts and details of your reserves policy (if applicable)

details of any funds held as a custodian trustee)

As of 31st December 2023, The Financial Position of the Charity was:

Institution	Balance Held
Metrobank	£119,923.72
Charles Stanley	£503,472.00

Total of All Financial Assets - **£623,395.72**

All the funds received by the charity were provided from an interim single legacy donation. Any future funds will be received solely received will be from either:


- 1) Finalisation of the legacy donation
- 2) Investment Income

When setting up the Charity, the trustees agreed that the funds received should be in place to benefit the children at Chuckery Primary School over an extended period.

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	James Pearce	
Position (eg Secretary, Chair, etc)	Trustee	
Date	26 th September 2024	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

No (if any)

Receipts and payments accounts

CC16a

For the period
from

1st January 2023

To

31st December

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Warners Law LLP	222,018	-	-	222,018	-
Warners law LLP	100,000	-	-	100,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	322,018	-	-	322,018	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	322,018	-	-	322,018	-
A3 Payments					
Warners law LLP	1,000	-	-	1,000	-
Moiria P{rotani	300	-	-	300	-
Chuckery Primary School	60,000	-	-	60,000	-
Chuckery Trust (Charles Stanley)	221,000	-	-	221,000	-
Chuckery Trust (Charles Stanley)	258,000	-	-	258,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	540,300	-	-	540,300	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	540,300	-	-	540,300	-
Net of receipts/(payments)	- 218,282	-	-	- 218,282	-
A5 Transfers between funds					
A6 Cash funds last year end	338,206	-	-	338,206	-
Cash funds this year end	119,924	-	-	119,924	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	MetroBank	119,924	-	-
			-	-
		-	-	-
	Total cash funds	119,924	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK


	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets			-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Charles Stanley	Fixed Income	-	123,185
		UK Equity	-	59,423
		I,national Equity	-	191,232
		Property	-	26,126
		Cash	-	28,929
		Alternatives	-	74,576

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

		Print Name	Date of approval
		Jmaes Pearce	26.9.24



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Chuckery Education Support Trust

On accounts for the year
ended

31st December 2023

Charity no
(if any)

1200803

Set out on pages

(remember to include the page numbers of additional sheets)

Responsibilities and
basis of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2023
As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

Independent
examiner's statement

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:

S. Kirk

Date:

11/10/24

Name:

S. KIRK

Relevant professional
qualification(s) or body
(if any):

AAT LEVEL 2

Address:

3A BONNER GROVE

ALDRIDGE

WEST MIDLANDS

WS9 0DX

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

1. The first item is a copy of the
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